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ABSTRACT

This guide is one of a series of publications that the National Alliance of Business is providing to stimulate and sustain U.S. business efforts to restructure public education in order to make it more responsive to the changing requirements of the modern workplace. This publication provides business people with some of the tools that will help them take the critical actions that are needed. It provides two detailed planning guides for businesses, enabling them to plan successfully and structure their involvement in education within broad community coalitions and within their individual companies. Critical elements for success are identified. Case studies illustrate how business can have a substantial impact on education by doing the necessary preparation and planning and following through over the long term. Case studies describe action in South Carolina; Lowndes County, Alabama; Milwaukee, Wisconsin; and Rochester, New York. Thirty-one references are included. (KC)

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BUSINESS STRATEGIES THAT WORK

A Planning Guide for Education Restructuring

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NATIONAL ALLIANCE OF BUSINESS

CORPORATE **action** PACKAGE

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The Alliance's Corporate Action Agenda

☐ With its new Corporate Action Agenda, the National Alliance of Business supports corporate initiatives directed to purposeful, results-oriented actions to improve American public education. The Corporate Action Agenda provides the tools and assistance to stimulate and sustain the active participation of American business leaders in improving public education to make it responsive to the changing requirements of the modern workplace.

Components of the Alliance's Corporate Action Agenda include a series of "how to" publications, a video, and a range of activities to disseminate cutting-edge ideas and practices throughout the country.

Publications in the Corporate Action Agenda move business people from broad awareness of the education crisis to an understanding of education reform issues and the steps needed to help corporate leaders take decisive and direct actions to improve education. These publications include:

- ☐ ***Corporate Action Agenda: The Business Of Improving Education (Executive Summary)***
- ☐ ***Building A Quality Workforce Video***
- ☐ ***America's Leaders Speak Out On Business-Education Partnerships***
- ☐ ***A Blueprint For Business On Restructuring Education***
- ☐ ***Business Strategies That Work: A Planning Guide for Education Restructuring***
- ☐ ***Who Will Do The Work? A Business Guide for Preparing Tomorrow's Workforce***
- ☐ ***The Compact Project: School-Business Partnerships For Improving Education***

In addition to these written products, the Corporate Action Agenda features other tools and activities that foster collaboration, networking, and information dissemination designed to make business leaders effective advocates and action agents for education improvement and reform. These resources include:

- ☐ The Alliance's Partnership Network
- ☐ Alliance Executive Speakers Bureau
- ☐ Articles and Supplements in Leading Business Publications
- ☐ Educational Institutes, Regional Symposia, and Seminars
- ☐ Harvard Business School Business/Education Initiative

To join the National Alliance of Business and participate in the Alliance's Corporate Action Agenda for education improvement, please write to the National Alliance of Business, 1201 New York Avenue, N.W., Suite 700, Washington, DC 20005, or call (202) 289-2888.

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BUSINESS STRATEGIES THAT WORK

A Planning Guide for Education Restructuring

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NATIONAL ALLIANCE OF BUSINESS

Opinions expressed in this publication do not necessarily represent the official policy of the Department of Labor.

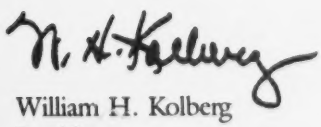
PREFACE

In 1989, the National Alliance of Business launched its ***Corporate Action Agenda***, a new initiative which provides tools and assistance to stimulate and sustain American business efforts to restructure public education in order to make it more responsive to the changing requirements of our modern workplaces.

Business Strategies that Work: A Planning Guide for Education Restructuring adds to that growing body of work in the field of education restructuring. This publication provides business people with some of the tools that will help them take the critical actions that are needed. It provides two detailed planning guides for businesses, enabling them to successfully plan and structure their involvement in education 1) within broad coalitions and 2) within their individual companies. The case studies that follow help illustrate how business can have a substantial impact on education by doing the necessary preparation and planning, and following through over the long term. There is a direct correlation between the quality of businesses' preparation and planning and the quality of the education restructuring effort.

While the businesses in these case studies approached their tasks in a variety of ways, they shared a common commitment to taking on the larger issues. Creating a collective vision of the desired future and successfully moving toward it demands a planning process that involves businesses, relevant constituencies of the education system, and cognizant community leaders.

In order for business/education partnerships to succeed in restructuring education, comprehensive planning must occur *both* within coalitions and within individual companies. Such planning includes building a knowledge base, establishing goals, developing a plan, creating an implementation strategy, assessing efforts, and then building on what is learned. It is important that education restructuring efforts be institutionalized both within coalitions and within companies in order to perpetuate and expand on accomplishments.



William H. Kolberg
President
National Alliance of Business

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I. Education Restructuring: An Overview and Update

Quality Education Is Key to America's Growth

Education is an indispensable investment in our children's future and our nation's economic survival. We live in an age of exploding technology and exploding economic competition. Good intentions and business as usual are not enough. If we are to meet the competitive challenges arising from Europe and Asia, we must have an educated workforce second to none. We cannot avoid taking on education restructuring in its broadest context.

Initial Restructuring Efforts

The 1980s saw the beginning of a national effort to improve the quality of American education. In 1983, ***A Nation at Risk***, by the National Commission on Excellence, provided a critical assessment of the education foundations of this country and generated a multitude of efforts to improve the educational system. Some of the results to date are:

- Teacher salaries have increased 20 percent, after adjusting for inflation, since 1980-81. In 1988, they averaged $28,300.
- Graduation requirements have been strengthened. According to the Educational Testing Service, at least 75 percent of last year's college bound students completed four years of English and three each of mathematics, science, and social studies.
- Public expenditures on education have risen. In 1988, the United States spent about $309 billion on education. Of that, $185 billion—about 4.1 percent of our gross national product—went to elementary and secondary schooling, an increase of $56 billion since 1982.
- Between 1983-84 and 1987-88, the number of education partnerships nationwide in public elementary and secondary schools rose from 42,200 to 140,800.

The Need for Restructuring Continues

But despite numerous efforts and notable achievements, too many students remain at risk and the overall level of achievement remains too low. Problems with drug abuse, pregnancy, suicide, and vandalism still plague many school districts across our nation. Signs of continuing educational stagnation are apparent in academic areas as well.

- America has a dropout rate of 25 percent, a figure which escalates to 50 percent in our inner-city schools. No American business could survive with the failure rate we have in our schools.
- Only one half of American 17 year olds compute well enough to use decimals and fractions, recognize geometric figures, and solve simple equations.
- About four in ten high school students have a "moderate" understanding of science, but only 7 percent have any degree of sophisticated understanding of the subject.
- In most school districts, minority achievement continues to lag far behind majority achievement.
- The average score of U.S. high school seniors on the Scholastic Aptitude Test fell slightly in 1989 in verbal skills for the third year in a row. The 1989 verbal average of 427 was down one point from 1988 and four points from 1986, wiping out most of the recovery in verbal skills that took place in the early 1980s.
- A recent study of the math and science proficiency of 13 year olds in Korea, Spain, Ireland, the United Kingdom, Canada, and the United States revealed that U.S. students ranked last in every category.

"The task before us is the restructuring of our entire public school system. I don't mean tinkering. I don't mean piecemeal changes or even well-intentional reforms."

David Kearns
CEO of Xerox, and
co-author, Winning the Brain Race

Business Involvement Must Lead to Fundamental Changes in Education

It is clear that to remain competitive, America must go beyond upgrading a school system designed for an agricultural society of the nineteenth century, to a more fundamental approach of rebuilding a school system prepared for the twenty-first century. We need to restructure the ways our schools are run and the ways our youth learn. Too few efforts to date have effected fundamental changes in our education system. Too many partnerships still operate at the margins, avoid the toughest problems, and fail to target resources to schools with the greatest needs.

Although efforts such as adopt-a-school programs, donation of technical equipment, the provision of jobs to students to give first hand experiences in the workplace, and other individual efforts to serve an individual classroom or student are important first steps, they have not fundamentally changed the education system. While we do see isolated examples of exemplary educational achievement, these piecemeal successes do not add up to a measurable national improvement in education. The pace of education reform has been slow, and progress has been uneven across the country. This has contributed to our frustrations that we are doing too little, too late, and far too slowly.

The Business Role in Education Restructuring

Just as many businesses have had to restructure to respond to the world around them, many schools face the same challenges in order to turn out graduates who are prepared to be responsible citizens and productive workers. Business needs to go beyond superficial involvement with education and apply the lessons it has learned from its own recent restructuring efforts to the problems confronted by the schools.

Restructuring demands a reappraisal of every facet of education. Our earlier publication ***A Blueprint for Business on Restructuring Education*** examines in depth five key components of education restructuring: 1) revamping organization, management, and administration; 2) developing the professionalism of teachers and administrators; 3) redesigning or updating curriculum and instruction methods; 4) instituting accountability and performance standards; and 5) integrating and linking community and social service delivery. A subsequent publication the Alliance prepared for The Business Roundtable, ***The Business Roundtable Participation Guide: A Primer for Business on Education***, added two more components: 6) developing effective and efficient systems for financing and budgeting education and 7) upgrading the quality of the educational infrastructure. Education restructuring includes actions within the schools and actions involving the broader community within which schools operate, and may require the redesign of policies, laws, and governance.

This publication, ***Business Strategies that Work: A Planning Guide for Education Restructuring***, provides business people with specific tools for taking the actions that are needed.

Preparation Is Key to Business Success in Education Restructuring Efforts

To enhance its effectiveness at promoting education restructuring, business must become educated about education. Then, informed business people can educate others, raise their consciousness, build consensus, develop coalitions, and serve as advocates for education in the broader community. Business can assist in management analysis and improvement, staff development, research and development, and application of new technology. And, of course, business can assist in financing new or expanding initiatives and replicating proven ones. Business can also apply its unique areas of expertise and comparative advantage to the education setting, whether it is marketing, financial management, legal services, or management consulting.

Business can let schools know what is expected of today's and tomorrow's workers, and can help build within the schools the same kinds of standards that business strives for in itself: customer satisfaction, product improvement, higher productivity, and lower costs. But to be effective in these efforts, businesses must take the business of restructuring seriously, and ensure that their involvement in restructuring is both well established within their institutions and well planned.

Business needs to make a long term commitment to work with government and educators over the course of at least one full generation if it is to be successful in its education restructuring efforts. As in the business world, major change in education cannot occur without planning strategically, beginning with a full understanding of education issues in their broadest national context and in their local application.

"Be prepared to work very hard, and for a very long time."

Kay Whitmore
President
Eastman Kodak

II. Planning Education Restructuring Efforts

AN OVERVIEW

"Our practice has been to respond to outside requests. However, this is changing. We are beginning to strategically plan our efforts."
Eastman Kodak
Rochester, New York

Business Involvement in Education Restructuring Efforts Has Evolved over Time

☐ Business participation in restructuring public school systems generally evolved from a long history of philanthropic experiences, perpetuated and furthered by the commitment of chief executive officers and senior level executives, and by informal company policies encouraging employees to serve their respective communities. Such involvement usually developed in response to the issues and needs defined by the education system, or to the specific interests and talents of company employees.

More recently, many businesses have come to realize that their involvement with education must be more strategic—that their contributions must lead to measurable improvements in educational output—if the American economy is to prosper and their businesses are to remain profitable. These businesses have become more deliberate in defining what they have to offer.

Planning Is a Key Component of Successful Education Restructuring Efforts

☐ Business leaders involved in successful education restructuring efforts have acknowledged that systematic up-front planning of their entire public policy strategy is necessary if the strategy is to significantly improve educational quality.

After years of involvement, instead of relying on *ad-hoc* efforts in which different departments within a single company might each have responsibility for a piece of that company's education initiative, these businesses are now formalizing their efforts through deliberate planning. They have realized that they must move beyond purely philanthropic contributions to assess the return value of their education initiatives to their companies and their communities. These businesses are looking for ways to improve their efforts.

Planning must occur on two levels: 1) as part of the community coalitions within which the businesses intend to work, and 2) within the businesses' own companies. Planning within coalitions establishes the broader goals of a community's or state's education restructuring efforts, laying out the roles and responsibilities of each of the coalition members. Planning within companies provides the framework for those companies to carry out their coalition commitments and institutionalizes the efforts within the companies, thus ensuring that if their leadership changes, or those responsible for education restructuring efforts leave, their companies' contributions to education restructuring will continue.

BUILDING A FOUNDATION FOR PLANNING

The conventional wisdom and traditional thinking about the "givens" in the education enterprise need to be seriously questioned. This section is designed to stimulate a fresh look at the differences in management tools and resources available to business and education, and to identify areas in which business can provide "value added" in the education restructuring process.

Building a Comfort Zone

For both the coalition and the company, the first step in the planning process is becoming educated about education. ***A Blueprint for Business on Restructuring Education*** refers to this as "building a comfort zone." Business people must understand the common characteristics of successful institutions, whether they are businesses or schools; the similarities of many tasks facing education and business; and the differences between themselves and schools in order to increase their sensitivity to the context in which schools function. While there are many differences between businesses and schools, it is important to note that there are also many commonalities.

Common Characteristics

Successful Businesses Require:	Effective Schools Require:
■ Strong leadership and vision	■ Strong leadership and vision
■ Clear goals and objectives	■ Clear goals and objectives
■ Strong quality requirements for products	■ Strong academic and behavioral requirements for students
■ A workplace conducive to getting the work done	■ School setting conducive to learning
■ Worker involvement in decision-making	■ Principal, teacher, and parental involvement in decision-making
■ High expectations for the performance of employees	■ High expectations for the performance of teachers and administrators
■ Autonomy for management at the work site	■ Autonomy for management at the school site
■ Staff with up-to-date skills	■ Administrators and teachers with up-to-date skills
■ Up-to-date equipment	■ Up-to-date equipment

Source: National Alliance of Business, ***A Blueprint for Business on Restructuring Education***, 1989.

When working to restructure education, businesses may be struck more by the dissimilarities than these commonalities. Business/education partnerships present a challenging task given the differences in organizational culture between business and education, specifically their different roles in and ties to American life, their different managerial philosophies, their different governing contexts and their different organizational structures. Business and education do not share identical concerns or see the same world, speak the same language, and, even more importantly, share similar values. Understanding the potential constraints to restructuring education, as well as various methods for overcoming them, can help businesses identify some areas in which their experiences may be brought to bear.

Differences Between the Business and Education Sectors

Business Sector:	Education Sector:
■ Powerful and autonomous chief executive and board of directors	■ Chief executive operating under constraints imposed by independent state and local boards and state officials
■ Can operate in relative privacy	■ A public institution, unable to limit media or citizen access
■ Can totally restructure by closing plants, changing products, changing markets, etc.	■ Must continue to provide education services to all clientele
■ Use of incentives and sanctions are accepted aspects of performance evaluation	■ No existing rewards (or sanctions) structure for good (or poor) performance
■ Can determine its organizational structure	■ Has limited organizational flexibility
■ Can shape its public image through media relations	■ Has little or no promotional resources
■ Can access state-of-the-art technology	■ Has few resources to keep technologically current
■ Can implement and enforce quality control standards for its goods and services	■ Difficult and complex to assess and measure a "quality" education
■ Can target its products and select its consumers	■ Must serve all students assigned to it

"We must set our focus on what is attainable and remember that we cannot move as quickly as we can in business. We have to deal with political and budget constraints."

Arthur Anderson and Company
Milwaukee, Wisconsin

While the differences between the business and education sectors can inhibit or frustrate change, their impact can also be mitigated if there is a will to bring about change. The potential to be more creative in managing the education enterprise exists, and some communities are trying bold new experiments in such areas as human management, financial management, organization management, public relations, technological resources, quality control, and market segmentation. It is clear that business has much to offer in these areas. In fact, it is even more essential that business apply its resources, tools, and techniques to advocate for and advance education restructuring. Today's successful businesses have adapted to the changed environment, new technology, and changing market needs; they can help schools do the same. But, they must take care to work with educators to be sure that their successful actions in the private sector are adapted to the education environment. Again, this points to the importance of becoming knowledgeable about education before trying to change it.

ORGANIZING A COMMUNITY'S COMMITMENT

The critical question facing businesses committed to restructuring the public school system is how to plan for and implement necessary change. There is a direct correlation between the quality of the preparation and the quality of businesses' education restructuring effort. Creating a collective vision of the desired future and successfully moving toward it demand a planning process that involves businesses, relevant constituencies of the education system, and cognizant community leaders.

Planning within Community Coalitions

1. **Forming a Coalition:** Goals for restructuring education within a community or state should not be determined by any one party. Rather, all of the critical players, or "stakeholders," should be brought together in this effort.
2. **Building a Knowledge Base:** Once formed, the coalition needs to examine the current state of the education system, including its performance to date, the resources with which it has to work, and its organization and political structure.
3. **Establishing Goals:** Only after the coalition understands the problems, resources, and constraints with which it has to operate can it begin to determine a collective vision for the education system.
4. **Developing a Plan:** Once an agreed upon vision is attained, the coalition can begin to outline plans designed to meet the specified objectives. In developing the plan, members of the coalition need to be cognizant of what resources will be necessary for implementation, and which organizations are best suited to provide which resources.
5. **Creating an Implementation Stategy:** Implementing and controlling the plan is accomplished by determining who is to do what, when it is to be done, and how to ensure that assignments and schedules are carried out as expected and produce the desired effects.
6. **Assessing Efforts:** Continuous monitoring will help determine necessary mid-course corrections, and a periodic evaluation will show the efficiency and effectiveness of the restructuring efforts, in terms of both process and outcome.
7. **Building on What Is Learned:** Executive leadership, goals and measurable objectives, a workplan and realistic budget, an organization structure and staff support with well defined roles and responsibilities, a communications system, and a management and documentation system are all necessary in order to maintain and eventually expand education restructuring efforts.

Businesses need to work in coalition with educators and government officials to develop a common goal, a plan for achieving that goal, and an implementation strategy. As activities are implemented, the coalition must periodically evaluate its results in order to make any necessary modifications in their plans and activities. This section summarizes the elements of the planning process for building coalitions, and then elaborates on the steps that must be taken.

"If partnership formulation were a business venture, no successful company would produce a slipshod business plan. It would assign a program manager and assemble a team of experts in appropriate fields who would think through and plan the goals, objectives, and strategies and then structure a framework and an action plan to accomplish them. The same approach should be used for school-business partnerships."

Dale Van Natta
Director, Civic & Community Relations
TRW Space & Defense

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1. Forming a Coalition

During this first phase, business needs to determine who is, and more importantly, who should be involved in the restructuring efforts. Whether business initiates the education restructuring effort or not, business should ensure that all of the critical players or "stakeholders" are involved, and that they are being used appropriately.

☐ **Determine the Stakeholders:** Two critical questions need to be asked: 1) Who has a stake in ensuring that the schools perform well? and 2) Who stands to lose if school performance is unsatisfactory? These parties are the stakeholders who must be involved in the early stages of the school restructuring efforts. Business cannot appoint the group, but must work together with the superintendent, union presidents, and other key leaders to begin the process.

Individual Corporations:

- CEO
- Human resources, personnel, training
- Strategic planning, policy
- Community affairs/public relations/government affairs
- Corporate contributions/foundations

Other Business/Labor Organizations:

- Chambers of commerce
- Other local business organizations
- Other business leaders
- Organized labor

Education:

- Superintendent
- School board members
- Central office staff
- Principals, assistant principals, and their organizations
- Teacher organizations/teachers
- College and university representatives
- School counselors
- Students

State/City/County Government:

- State and local elected officials, e.g., chair of the Education Committee of the House or Senate, mayor, city or county council members, etc.
- Private industry council chairs
- Job service administrators
- Representatives from state Departments of Labor, Education, and Social Services

Community:

- Parent organizations
- Community volunteer groups/civic organizations
- Community based organizations
- Religious leaders
- Media/public opinion shapers
- Foundations
- Social service and other not-for-profits
- Youth serving agencies

☐ **Decide How to Involve the Critical Players:** Determine how the various stakeholders should best be involved, and determine the best way to approach them. Define the relative stakes and the relative responsibilities. Consider who should serve in an advisory capacity, in an honorary position, as a working team member, or as a public leadership figure. Determine the best strategy, considering politics, personal relationships, and relative positions of the various people, to seek their involvement. The questions of whom to choose, and who does the choosing are both relevant here.

2. Building a Knowledge Base

Stakeholders must join together, first to examine the current state and needs of the education system, and then to analyze the economic, political, and other factors influencing the education system.

☐ **Conduct an Internal Audit of the Education System to Determine its Current State:**

Current and Projected Education Population Profile:

Gather and analyze basic demographic and social data on the population to be served and their families, including some or all of the following, as appropriate: age, race, sex, national origin, educational attainment, marital status, labor force experience, numbers and percent "at-risk," e.g., in families in poverty or on welfare, pregnant teenagers, juvenile offenders, alcohol and drug abusers. It is necessary to select the target population(s), and to know about their needs:

- Preschool population
- School-age population
- At-risk school age population

School Human Resources Profile:

Determine the demographics and the qualifications of the teachers, counselors, principals, superintendents, assistant superintendents, and school board members. Identify shortages of qualified personnel. Identify in-service training opportunities, and determine the quality and relevance of those opportunities.

School Achievement Profile:

How well are your schools doing? Not all of this information may be available in your jurisdiction, but the types of information relevant here include:

- Literacy or basic skills level of students at the completion of elementary, middle, and high school (as determined by the California Achievement Test or other key measurement instruments)
- Percent and profile of college bound students
- Percent of students receiving remedial education by subject at the elementary, middle, and high school levels
- Dropout rates for middle and high schools, by ethnicity and geographic area
- Attendance records and trends, by race and age
- Aptitude test achievement scores and trends
- Schools' performance rank within the state (if available)
- State's national ranking in education
- School improvement goals, if any have been identified

Organizational Design:

How do your schools operate? How are decisions made? Consider both formal and informal relationships, including:

- Governance structure
- Decision making lines
- Local school politics
- Key policies and procedures
- Planning cycles
- Management information sources
- Communication mechanisms

Organizational Resources:

What resources, services, and programs are currently available to assist educators and students? These resources may be useful to support various aspects of education restructuring:

- Existing higher education opportunities
- Existing scholarship opportunities and referrals
- Job placement services and information
- Counseling services for college placement and financial aid
- Vocational preparation programs
- Parent/teacher association programs
- Recognition programs or other student incentives
- Existing partnership efforts in the community
- Other government programs, including the Job Training Partnership Act, Head Start, etc.

Financial Resources:

What funding is available? Is it sufficient to meet the needs, and is it used effectively and efficiently? Some financial data to gather include:

- Funding per student, by age, race, and geographic area
- Funding trends (last increase or decrease) and budget projections
- Administrators' and teachers' salaries and comparisons to other salaries
- Percent of state education budget in community
- Funding comparisons, nationally and regionally
- Funding for curriculum, instruction, training/in-service, facilities, and other categories
- Federal funds available

☐ **Place Education Issues in a Broader Context:** Review and analyze the external or environmental factors that affect the education system and its ability to function effectively and efficiently, i.e., local demographic, economic, labor market, and social characteristics of the broader community. Is the local population aging or having a baby boom? Is it growing or shrinking, shifting geographically, or changing demographically? These factors will have an impact on the education system. The lists suggested below are optional; it is necessary to determine the most critical factors depending on local needs.

Local Economy and Labor Market:

Local employers, labor market needs, industries, occupations in demand
Labor market trends and projections, skill shortages
Existing job training and employment placement opportunities
Employment and unemployment rates and trends

Local Community Demographics:

Numbers of single-parent households, two-parent working families, unwed mothers, etc.
Health statistics, including infant mortality rates
Crime rates, incarceration rates
Per capita income, families in poverty, etc.

Other Institutions and Organizations Serving Youth and their Families:

Private organizations (business organizations)
Public organizations (government agencies and programs)
Private not-for-profit organizations (religious, civic, volunteer, social service agencies, employment and training, alternative education)

Many ready sources of good information exist on the above topics at the national, state, and local levels. National Alliance of Business publications ***The Fourth R: Workforce Readiness*** and ***A Blueprint for Business on Restructuring Education*** contain helpful resource listings and bibliographies.

3. Establishing Goals

The goals a coalition sets for itself should reflect the community's collective future vision for the education system. Goal-setting should be a strategic planning process that identifies priorities and sets measurable objectives for the educational system. This is the most important step for the coalition before actual restructuring begins. Because of this importance, attention must be paid to ensuring that adequate time and staff are allocated to this task.

☐ **Determine Primary Goals:** Collectively, business and other stakeholders must create a desired future for the education system. This collective vision will probably encompass the concept of educating ***all*** students in America at high skill levels, preparing them to be productive employees and citizens. It may also aim to ensure that the students are not only highly skilled in reading, writing, and computation, but that they can also think critically, analyze and solve problems, and work together productively in teams.

☐ **Establish Measurable Objectives:** Given the universe of need, and the fact that needs always exceed resources available, realistic expectations for the schools must be established. Consider what can reasonably be accomplished within one year, three years, five years, and ten. Measurable objectives should be developed for the goals you select, and indicators of these objectives may include:

Reduced dropout rate or improved high school graduation rate
Reduced absenteeism
Improved test scores
Reduced number of students in remediation at the elementary, middle, and high school levels
Increased percentage of students who are National Merit Scholarship finalists
Improved student physical and mental fitness (reduced drug and alcohol use, pregnancy rates, suicides, violence)
Improved citizenship, i.e., reduced rates of expulsion and suspension; increased participation rates in community service, school clubs, and other activities

- Improved college placement and completion rates
- Improved job placements, retention rates, and wage levels

4. Developing a Plan

Once goals have been set, the coalition must develop an action plan to attain the desired ends. It involves 1) identifying discrepancies between the current state and the desired future of the education system, and 2) selecting and/or inventing appropriate courses of action in the areas of policy, programs, and practices.

☐ **Establish Means for Attaining the Specified Goals:** Recommendations for restructuring education fall into seven major categories: school-based management, professionalism of teachers and administrators, curriculum and instruction, accountability, linking schools with social services, budget and finance, and educational infrastructure. While planning guidance in these areas is presented here, a more complete understanding of the policy issues involved in each of these areas can be found in the Alliance's publication ***A Blueprint for Business on Restructuring Education*** and in ***The Business Roundtable Participation Guide: A Primer for Business on Education***, prepared by the Alliance for The Business Roundtable.

School-Based Management:

- Support the authorization of policies and programs encouraging school-based management, or encourage local school boards to initiate school-based management
- Provide training and technical assistance to schools and districts initiating school-based management

Professionalism of Teachers and Administrators:

- Improve the curricula of schools of education
- Reassess certification requirements
- Promote professional development opportunities
- Promote financial rewards and other recognition and incentives for teachers who show exemplary achievement and motivation

Curriculum and Instruction:

- Improve the readiness of children to start school
- Assess current curriculum in light of goals for student success and entry level skills needed by business
- Promote the use of varied instructional techniques—designed to match the way different students learn—such as individualized, competency-based instruction; group projects and teamwork; and work experience programs for students which expose them to business settings and workplace requirements
- Improve the quality of textbooks/material, ensuring that they demonstrate the application of subject matter to real world situations
- Improve or update facilities/technology/equipment
- Improve job preparation/career counseling services

Accountability:

- Lobby for changes in assessment policies
- Define performance-based accountability/outcome measures for academic achievement, including reading, writing, mathematics, science, history, geography, and speaking
- Develop performance-based accountability measures for teachers and administrators
- Determine measures of success for schools

Linking Schools with Social Services:

- Develop mechanisms to identify at-risk students and provide support for them
- Develop a case management system for students, including mentors, counselors, etc.
- Develop a support network/services for students, including remedial help, day care, drug counseling, etc.
- Involve parents in students' learning, employment, and/or higher education planning

Education Financing:

- Promote the development of an equitable system for school financing
- Establish a financial goal for new funding for education restructuring initiatives
- Establish foundations, scholarships, endowments, education improvement funds, trusts, or other financing mechanisms, and set financial goals
- Pass tax levies to increase funding for education restructuring
- Streamline financial management systems to reduce costs
- Provide advice and assistance in financial management and budgeting

Educational Infrastructure:

- Assess the current condition of the educational infrastructure, including health and safety factors
- Redesign the system of building management and maintenance
- Develop a plan for utilizing alternative spaces for educational purposes
- Develop a plan for sharing existing educational structures, and their associated costs, with the provision of other services
- Develop a plan for upgrading the use of technology within the educational system

☐ **Determine the Roles of Each Player:** Educators, business people, and other stakeholders must sort out how each can best contribute. As the expertise and resources of each of the stakeholders varies, so too will the contributions that each will make to the restructuring initiative. Each stakeholder must determine what role it will play in each of the areas the coalition has chosen to pursue, providing various types of support, such as:

- Advocacy
- Financial resources
- Capital equipment
- Staff time
- Technical assistance and training
- Management advice
- Research

5. Creating an Implementation Strategy

☐ **Establish a Structure for Implementation:** While some of the activities each stakeholder will carry out can be accomplished independently from the activities of the other stakeholders, others will require some degree of coordination. A structure needs to be established to promote this coordination and to assess the progress of any independent actions, ensuring that the overall restructuring effort remains on track.

Coalition members must meet periodically in order to coordinate and review efforts. It is usually most effective to utilize an independent entity, or "intermediary," to assure coordination and review. High level representatives from each coalition organization should serve on a policy oversight committee to ensure that the education restructuring effort continues to address the goals outlined by the coalition.

☐ **Establish an Implementation Schedule:** Coalition members must agree to an implementation schedule delineating when various tasks need to commence and finish. This is likely to be a phased work plan: some tasks may be dependent on the completion of others, and resources may not allow for the implementation of all projects simultaneously. Setting priorities may need to be a key part of this effort.

Oversight of the implementation process is essential. Intermittent checkpoints need to be established prior to deadline and monitored periodically by a designated individual. Periodic assessment is an essential management tool. It pinpoints achievements and discrepancies in terms of desired changes. Monitoring identifies necessary mid-course corrections in budget, operations, programs, or other areas.

6. Assessing Efforts

☐ **Establish a Means for Evaluation:** Although continuous monitoring will help determine necessary mid-course corrections, a periodic evaluation shows the efficiency and effectiveness of the restructuring efforts, in terms of both process and outcome. Evaluation reveals ways the coalition can refine and improve efforts in the future, identifying what worked, what was less successful, and why. Several types of evaluations may be used, including anecdotal success stories, process assessments, impact assessments (both immediate and long range), and cost/benefit analyses. The type of evaluation desired should be considered in the early planning stages so the initiative can be assessed on a continuing basis. School restructuring and renewal is a continuous proces; assessment results should be used to modify coalitions' goals, plans, and implementation strategies.

Anecdotal Accounts/Success Stories:

Individual outcome stories are usually helpful to turn impersonal statistics into real, human stories about results that affect people's lives.

Management (Process) Assessment:

An examination and analysis of the implementation process will reveal the management efficiency and effectiveness of the effort, and will identify areas that require attention. Questions to consider include:

- Was it an effective, efficient process?
- How could it be improved in following years?
  - Leadership
  - Management
  - Resources
  - Plans and timetables
  - Execution
  - Staffing
- What was the reception by local/state education officials?
- Were each of the key stakeholders satisfied with the progress that was made?
- Did the program improve business/school relationships?
- Were the media used effectively?
- Were any key players left out?

Impact Assessment:

Impact assessment examines the outcome or impact of all of the efforts. Impact assessments may focus on immediate or longer-range outcomes, such as:

- Did students benefit from the effort, both in the short term and upon graduation?
- What were their learning gains?
- Are they prepared for the workplace?
- What were the impacts of the restructuring efforts on the local community?
- What were the impacts on local business' abilities to work with education?

Long-Range Impact Studies:

Long-range impact studies yield information about the effects of educational restructuring on the lives of young people over a period of years. These studies require a long-term follow-up effort to track students over several years, and to compare their accomplishments and careers with a control group of similar students who did not receive services or participate in the program. The critical questions asked are:

- Did the intervention measurably affect students':
  - Long-term learning gains?
  - Long-term employment prospects?
  - Earnings?
  - Ability to remain independent from welfare and other social programs?
- Did the reform efforts systemically change the ways in which education and community programs and services are delivered? For example, did efforts measurably improve:
  - School-based management?
  - Professionalism of teachers and administrators?
  - Curriculum and instruction?
  - Accountability?
  - Linking schools with social services?
  - Budgeting and financing?
  - Educational infrastructure?
  - The above are obviously hard to measure.

Cost/Benefit Analysis:

A cost benefit analysis reveals whether the costs of the efforts are outweighed by their benefits, and where greater efficiencies might be achieved. In analyzing costs versus benefits, both financial and non-financial benefits should be considered.

Costs might include:

- Personnel (including overhead and fringe benefits)
- Facility
- Equipment
- Messengers, postage, telephone, and fax expenses
- Travel and *per diem*

Benefits might include:

- Positive outcomes for participants (e.g., going on to higher education, getting a job, getting a job with higher wages and higher career potential, joining the military, etc.)
- Dollars saved on not needing other interventions (e.g., welfare savings, criminal justice savings, unemployment insurance savings, health care savings, etc.)
- Removal of gaps in services for particular target groups
- Dollars saved through coordinated service delivery
- Value of work or services performed by participants that would have had to be purchased if the participants had not done it.
- Improvements in community well-being and quality of life
- Impacts on corporate public image

7. Building on What Is Learned

To promote successful education restructuring, changes must be institutionalized within the education system, while the development and renewal process is continued. This may require an examination of needed changes in policy, structure, or leadership.

☐ **Maintain and Expand Success:** To maintain and eventually expand education restructuring efforts, several key elements must be in place within the coalition and education restructuring process. These include executive leadership, goals and measurable objectives, an organization structure and staff support with well defined roles and responsibilities, a workplan and realistic budget, a communications system, and a management and documentation system. If current efforts are successful, expansion may be accomplished through:

- Implementation of proven initiatives in other sites
- Expansion of efforts in existing sites
- Development of mechanisms to enable widespread replication
- Extending time commitments for the initiatives
- Taking efforts to the next level, i.e., county, state, regional, or national
- Developing networks to communicate with other education restructuring efforts

☐ **Document and Disseminate Results:** Many excellent education restructuring efforts are often inadequately documented. Documentation and reporting mechanisms are needed to inform the various partners, as well as others, about status, progress, problems, and accomplishments. This can be accomplished through print and electronic media and public relations, periodic meetings, newsletters, or periodic program and budget reports on planned versus actual activities.

ORGANIZING A COMPANY'S COMMITMENT

A well developed plan ensures that company activities are as effective and efficient as possible. Furthermore, planning creates an institutional commitment for education restructuring initiatives, ensuring that the activities continue even if key individuals leave the company.

Planning within the company could take place, before, during, or after a company first becomes involved in education restructuring. A business might begin developing its own plans before it reaches out to other institutions to initiate an education restructuring initiative within its community or state. In particular, it can start to inventory its existing involvement in education and assess the impact it is having. Alternatively, some companies have found that they had to first understand the complexities of education restructuring and the roles they might play in their community before they could think of the internal implications. But at some point, companies should begin to plan more strategically about what they will do and how they will organize internally to do it.

Planning within a Company

1. **Building a Knowledge Base:** Just as for coalitions, businesses must come to understand the current state of education and its relationship to their own profitability before they can establish their goals.
2. **Establishing Goals:** Businesses' goals for education restructuring initiatives will be closely related to those of the coalitions of which they are a part, but may focus on those goals most directly related to the economic well-being of their companies, and might include additional goals which are company directed.
3. **Developing a Plan:** The plan the company needs to develop is quite different from that developed by the coalition, and must focus on what the company needs to do to meet its commitments to the restructuring effort.
4. **Creating an Implementation Strategy:** A company's implementation strategy is closely related to its plan development, and includes establishing a center of responsibility for the company's education restructuring initiative and assigning units tasks for specific activities.
5. **Assessing Efforts:** Just as with the coalitions, companies need to periodically assess their education restructuring efforts to determine whether they need to make any mid-course corrections.
6. **Building on What Is Learned:** The evaluations conducted as part of the assessment effort should help companies improve on their education restructuring initiatives.

Developing an internal company-wide plan is crucial to the success of the education restructuring effort. This section summarizes the elements of a company's internal planning process and elaborates on the steps a company should take to ensure that what it promises externally, it is prepared to deliver internally on a sustained basis.

"It is important to consider what is important to the company, what to focus on in the area of education, and how to consolidate a variety of efforts."

Eastman Kodak
Rochester, New York

1. Building a Knowledge Base

Business people need to educate themselves about education—become comfortable with the issues of education in their states and communities and understand the relationship between education and their own profitability. This includes examining the current state of the education system and analyzing the political and economic environment in which it operates (detailed more extensively for coalitions in the earlier section on "Organizing a Community's Commitment"). This can be done as part of the coalition's education process, or it can be done separately.

Additionally, while a great many businesses are already actively involved in supporting education, businesses that want to have a real impact on the quality of education need to evaluate their level of commitment in light of their goals.

☐ **Inventory Current Company Activities on Education:** Companies should understand what they are doing, what they would like to accomplish, and what they need to do to meet their goals. To do this, they must first inventory:

- Organizational units involved in education
- Individual employee volunteer efforts
- Consistency of activities
- Assessment of impact

2. Establishing Goals

☐ **Determine Primary Goals:** Goals for a company involved in education restructuring are most realistic when they are clearly linked to the company's economic well-being. Goals can include both changes external to business (education) and internal to business (their companies). Although it is often difficult, these goals should be measurable. If business is to remain involved in education restructuring for the time necessary to achieve results, it is critical that the education restructuring goals relate back to business' profitability goals. Business must see the relationship between education restructuring efforts and the overall quality of the workforce.

As mentioned in the section on coalitions establishing goals, goals for the education system will probably relate to educating *all* students in America at high skill levels, ensuring that students go beyond mastering routine skills, to mastering the art of learning.

Goals for the Company:

While goals for the education system will probably always be paramount, businesses might wish to include additional goals which are company directed, such as:

- Improve the corporate public image
- Increase the involvement of other businesses in education restructuring
- Increase the awareness of the importance of education among employees
- Increase employee participation in promoting education improvement
- Improve the environment for employee involvement in education within the company

☐ **Establish Measurable Objectives:** In order for business to be able to measure the success of its education restructuring initiatives, measurable objectives should be established for each goal embraced by the company. Since attainment of many goals will require years, milestones should be developed so that progress toward the goals can be assessed.

3. Developing a Plan

☐ **Determine your Company's Role:** The niche a company carves out for itself in education restructuring should be based on the goals of the coalitions in which it participates, the goals of the company, and the company's area(s) of expertise. Companies need to develop a set of projects which support the overall education restructuring plans in the community and address one or more of the following areas: school-based management, professionalism of teachers and administrators, curriculum and instruction, accountability, linking schools with social services, education financing, and educational infrastructure. In determining these projects, business can rely on its particular skills in such areas as:

- Advocacy
- Staff development

- Management analysis and improvement
- Research and development
- Applications of technology

Specific activities that business might engage in, relying on these skills, include:

- Lobbying for education reforms, increased resources, and/or improved linkages between the schools and the social service agencies
- Establishing training centers for administrators, managers, and teachers
- Working with districts and schools to develop improved management systems
- Supporting the development of new assessment and accountability tools
- Developing a plan for incorporating relevant technologies into the schools

(A more detailed list of activities is listed on pages 10 and 11 of the Alliance's publication ***A Blueprint for Business on Restructuring Education***.)

☐ **Delineate Resources:** Once a company chooses the activities in which it will engage, it needs to develop plans committing the time, resources, and staff necessary to implement them. Identified gaps between what is needed and what is available must be addressed at this time.

Assess Time Resources:

In establishing a timeframe for education restructuring, business needs to overcome its own predilection to focus on short time frames, and build its education restructuring initiative into five, ten, and possibly twenty-five year plans. Most education restructuring initiatives will not only take a long time to implement, but will take an even longer time to show results.

- Over what period of time is the company willing to be involved in education restructuring efforts?

Assess Financial and Capital Resources:

Financial and capital resource commitments must also be long term. Year to year budget allocations will leave programs at risk. Furthermore, education restructuring initiatives should be a part of a company's general budget; they should not be in a discretionary account where they may be reduced or eliminated easily. Long term, stable funding is necessary if coalition partners are to feel secure about business' commitment.

- How much is the company able and willing to spend and invest in education restructuring, over what period of time, from what source(s)?
- Can the corporation loan or contribute capital equipment, technology (such as computers, office equipment, audio-visual equipment, etc.) to the schools?

Assess Human Resources:

Staffing should not be ***ad hoc***. For education restructuring initiatives to succeed within companies, CEOs need to convey their interest to employees and commit some of their own time and energy to the cause, ensuring that all employees understand the importance of the effort within the companies. A high level staff person should be assigned overall responsibility for the effort, with the authority to ensure coordination among activities. Those involved must receive appropriate training, and the value of their work should be recognized in the company. Ideally, their work in education should be a part of their performance reviews and appraisals.

- Is the CEO willing to be visibly associated with the project?
- How many senior level and other corporate personnel can be allocated to the project, and in what capacities are they best suited to provide assistance?
- How many additional company personnel will be able to work on education restructuring activities, over what period of time, and for how many hours per week?
- How can training be provided to prepare personnel for their education restructuring responsibilities?

4. Creating an Implementation Strategy

☐ **Develop an Action Plan:** Implementing and controlling the plan designed by a company is accomplished by determining who is to do what, when it is to be done, and how to ensure that assignments and schedules are carried out as expected in order to produce the desired effects.

Who will have overall responsibility for the company's education restructuring initiative?
What units or individuals will be responsible for specific projects or tasks?
How can these individuals be held accountable for their performance on these projects and initiatives? Should activities associated with the education restructuring initiative be part of employees' performance appraisals?

☐ **Support the Education Restructuring Initiative:** Businesses can institute various other activities outside of the primary education restructuring effort in order to support and encourage the effort. Such activities might entail:

Including education restructuring activities in the company's annual report
Including information on education restructuring activities in speeches by the CEO both inside and outside of the company
Including information on education restructuring in a company newsletter, or initiating a newsletter on restructuring activities
Informing all employees about the importance of education restructuring and the company's involvement
Encouraging employees to participate in their own individual efforts to improve education, such as serving on school boards or committees, or becoming more involved in their own children's schooling
Establishing a leave policy allowing parents to participate more actively in school events
Instituting a series of lunch seminars on such topics as how to interact effectively with schools, or how to assist your children to be better students

5. Assessing Efforts

☐ **Establish a Means for Evaluation:** Evaluation reveals ways business can refine and improve efforts in the future, identifying what worked, what was less successful, and why. Business needs to not only evaluate the success of the education restructuring effort in terms of its impact on education, but also in terms of its impact on the company. This is where business needs to review the internal goals it established. As with the coalition, evaluations can include:

Anecdotal accounts/success stories
Management (process) assessments
Impact assessments
Long range impact studies
Cost/benefit analyses

(More detail on these evaluations is provided in the earlier section on "Organizing a Community's Commitment.")

6. Building on What Is Learned

☐ **Make Necessary Mid-Course Corrections:** The results of evaluation should feed back into a company's education restructuring efforts. Periodic evaluation is necessary in order to allow for any needed mid-course corrections.

Are activities having the desired effect?
Are allocations of resources and time adequate?
Are staff performing as needed?
How can efforts be improved?

CRITICAL ELEMENTS FOR SUCCESS

A clear message that emerges from businesses committed to restructuring their respective public school systems is that success does not come easily. However, analysis of their experiences indicates that successful education restructuring efforts share certain common elements. These elements are part of business strategies that work.

An Open Acknowledgement that an Improved Educational System Serves Corporate Interests. By stressing that the business sector is a primary beneficiary of a quality educational system, businesses will be able to convince educators that their attempts are authentic and not just fleeting "do good" missions. Even more important, openly stating that they view their education restructuring efforts as directly relevant to their firms' well being sends a clear message that businesses are engaging in a long term commitment.

"Education is vital to our employees, to our business and our whole society. Education is central to lower crime rates, higher quality of life, and a better work force."
DowBrands
South Carolina

Inclusive Rather than Exclusive Membership. To reduce the natural resistance to change, critical players, especially those responsible for implementing change, must be involved in the effort at an early stage. Therefore, from the very beginning careful attention should be given to identifying relevant constituencies and bringing them into the initial planning stages. Within coalitions, reform must evolve from the collaborative efforts of business, education, government, and the community; in companies, the key executives involved with education restructuring activities, both in the home office and any regional offices, must participate in the process of establishing the corporation's goals and directions.

Management of Complexity. The complex nature of business/education partnerships requires that the efforts be well organized and managed both within coalitions and within companies. Continuous attention must be directed toward intra-organizational as well as inter-organizational integration. Within coalitions, each member of the partnership should be well integrated through close working relationships. Within companies, education restructuring efforts should be coordinated through a central office or staff person. The overall responsibility of the leaders is to prevent isolation of working units by developing networks of cooperative relationships among participants.

Commitment, Creativity, and Consensus on Goals. Business/education partnerships need to be entered into with a full commitment to 1) overcoming barriers that impede the building of the collaborative enterprise, 2) investing the necessary technological and human resources, and 3) making the internal changes that successful external partnerships entail.

Without creativity many efforts fail. However, innovation must be complemented by sound management practices. Not knowing how to manage is the single largest reason for the failure of new ventures.

Consensus evolves from and is sustained by explicitly agreed upon goals and a clear understanding of what is and what is not within the domain of the partnership or within the domain of the company's education restructuring effort. Moreover, consensus emerges from perceiving each of the partners as an ally. It is especially important that businesses not convey a paternalistic attitude by viewing efforts as gifts that can be withdrawn at will.

"One way to send a clear signal about business' long term intent is for companies to bundle year-to-year grants into five- or ten-year commitments. It is important that the public and members of educational institutions perceive that business intends to see reform through."
General Electric
Lowndes County, Alabama

Stable Leadership. Progress and consistency is ensured by a stable leadership base. While leadership may change, it is important to ensure that an ongoing mechanism exists to see the effort through. The corporate sector must demonstrate its staying power, both financially and in sheer human effort. One way to send a clear signal is for companies to bundle year-to-year grants into five- or ten-year commitments. It is important that the public and members of educational institutions perceive that business intends to see reform through. Another way to signal that business is invested for the long term is to develop a multi-year or even multi-decade plan of action backed by volunteers, incentives, rewards, and a supporting environment.

Management Structure and Staffing. Successful collaborations and company education restructuring efforts understand the importance of structure in their efforts. They establish clear roles and responsibilities of each participant, clear lines of authority and decision making, effective communication systems, and a well documented workplan for what they want to accomplish. Absence of such specificity usually leads to confusion, conflict, redundancy of effort, and, even worse, no action.

Application of the Business Partner's Competency. Good intentions work but only under stringent conditions. "Do good" activities only work when they fit the organization's competence and values--an extension of what the company is doing rather than a diversion. For example, corporations can help school systems move away from layered bureaucracies toward a decentralized management structure. Businesses can draw upon their own attempts to restructure and rebuild competitive industries. In sum, businesses should assist in what they know well.

Marketing Strategy. The more sophisticated collaborations employ basic marketing and public relations strategies to keep the partners, the constituencies, and the general public informed about the efforts, and therefore supportive of them.

Accountability Mechanisms. Just as partnerships seek to improve accountability in the education system, reform initiatives themselves must operate with appropriate means of accountability. Ongoing monitoring of progress against plan, periodic assessment of progress toward goals, and documentation of overall accomplishments are essential ingredients.

In summary, business leaders involved in successful education restructuring efforts acknowledged that systematic up-front planning of their entire public policy strategy was a necessary action. It is also noteworthy that the most progressive and proactive businesses working in education restructuring still recognize that there are limits to their inputs and impacts. Therefore, they appreciate the importance of placing more emphasis on prevention of problems rather than on costly and often less effective cures. They acknowledged that they needed to do a better job of connecting the education enterprise to the work world and vice versa. They approach education restructuring knowing that it is not their primary mission, and recognizing that they need to ensure that their efforts leverage the greatest returns on their investment. In that light, they recognized the importance of internal planning as well as collaborative work with other community members.

III. Case Studies In Restructuring

THE SOUTH CAROLINA STORY

Initiatives in the state of South Carolina; Lowndes County, Alabama; Milwaukee, Wisconsin; and Rochester, New York illustrate how commitments by educators, business people, and community leaders to restructure a public school system were translated into a course of action. Although these efforts share the common goal of changing a public education system, each is unique. These diverse efforts provide useful guidelines for those committed to engendering a quality education system.

Introduction

South Carolina's is a statewide education restructuring effort, one which had the active leadership of the governor as well as business, education, and community leaders. The collective efforts of these individuals and organizations spawned landmark legislation in 1984, and continuing review has led to further improvements through recent amendments.

The story of South Carolina is one of perseverance. A review of the steps taken since 1984 reveals how to meet with success when taking on the challenging task to revamp a state public education school system.

How It Was Accomplished

The Launching Pad

A recurring awareness that economic development was dependent upon an improved educational system: Economic changes in the 1970s spotlighted the importance of improving skill levels of the current and future workforce. The declining presence of the textile industry required that South Carolina develop a diversified economy. This potential business sector would need employees with higher skill levels than those who worked for the textile industry. Without such change, local workers would be unemployable.

A recognition that South Carolina was "at risk" educationally: In 1979, more than a third of South Carolina's beginning first graders were not ready to enter the level of learning typical of first graders nationwide. The pervasive perception of the South Carolina population was that its school system was alarmingly inferior.

Assessment of the consequences of resisting reform: It was generally acknowledged that the state's economy would suffer unless the education system produced a qualified labor force. Moreover, local workers could be by-passed if businesses met their labor force demands by importing workers from other regions.

Leadership from the governor: Governor Richard Riley's proposal to increase the sales tax by one percent pushed serious intention into a course of action. Revenues generated were to be directed toward education. This proposed increase was augmented by a 6 percent increase in the regular state appropriations for elementary and secondary schools.

The willingness of education to accept the need for real change: The desire of the educational system to shed its poor reputation overcame a natural tendency of institutions to be suspicious of outside involvement and to fear change.

A broad support base: Governor Riley and other reformers won the support of individuals who were respected and influential in the education system, the private sector, government, and the community. They were able to do this by demonstrating South Carolina's stake in an improved public school system.

Continued commitment was ensured by incorporating participants' input into policy decision making and subsequent implementation strategies.

A public pronouncement by business that it had a stake in an improved public school system: The business community announced that there was a vital link between the quality of elementary, secondary, and higher educational systems and the prosperity of South Carolina's business and industry.

First Wave of Reform: Setting the Stage for Specific Action

The support of business: Governor Riley actively courted private sector input in shaping education reform proposals. Business leaders helped formulate legislative policies to improve the educational system of South Carolina and lobbied for the proposed bill. Through their hands-on involvement, business leaders became part of the solution and ardent supporters of the reform movement.

The support of the education system: Government, business, and community leaders gained the support of the education system through a series of cooperative, non-judgmental discussions with its relevant constituencies—the school board, the superintendent, principals, teachers and their union, and counselors.

The cultivation of networks: The South Carolina Chamber of Commerce organized an on-going communication network among diverse groups in order to build statewide support for reform. Grassroots support was cultivated by creating local discussion groups, developing lobbying teams, generating one-on-one contacts between business and schools, and stimulating similar local level activities.

Second Wave of Reform: Public and Private Action

Passed the Education Improvement Act of 1984 (EIA): The Education Improvement Act was crafted by a partnership of business, education, state government leaders, and parents. The Act established clear standards of achievement and accountability. The EIA also instituted organizational changes within the education system and built in business participation. The legislation required that each school have an improvement council to plan for and institute necessary changes. To propagate private sector presence in the reform movement and to monitor the reforms and propose refinements, the Act provided for a joint business-education subcommittee of the two blue ribbon committees involved in crafting the Act. Active participation of this subcommittee was secured by staffing it with an executive director. The Act established:

An accountability mechanism: The Division of Public Accountability was created to oversee implementation of the Act.

An ongoing review of progress: A separate legislative select committee, composed mainly of representatives from the private sector, reviews progress of the EIA, makes recommendations on funding specific programs, and reports to the General Assembly.

Private sector input: School improvement councils were created and schools and school districts were mandated to "create effective partnerships to strengthen the involvement of parents, broaden community involvement, and increase participation of business and industry in the public schools."

Created The Alliance for Quality Education in 1985: A private initiative–The Alliance for Quality Education–augmented government action in Greenville County. The Alliance is an independent volunteer group with two purposes: 1) building broad community involvement in and support for public education and 2) helping Greenville's public school system, the district that has by far the largest number of students in South Carolina, achieve its fullest potential. Its key roles are:

Drawing attention to major issues affecting Greenville's public schools.
Bringing people from the community, government, and the education system together to exchange constructive ideas.
Stimulating change that will improve the quality of the education system.
Building resources by raising and directing funds, talent, and skills required by the schools.

The Alliance has a mini-grant program. Grants are awarded to districts, principals, and teachers to assure impact at all three levels. To date, the program has awarded $170,000 for 270 proposals. Other programs include a Leadership Forum for Principals, a management and leadership seminar for Greenville County principals, a quarterly newsletter concerning issues on public schools, and an annual community forum on public education.

"One of the greatest gifts you can bring, in addition to money, is your business planning and management skills. . . However, we cannot force our planning paradigm on schools. We do not have the same bottom line."
Liberty Life Insurance
South Carolina

Developed a programmatic response to the reform agenda–The Youth Collaborative: In 1986, Richland County, assisted by a Ford Foundation grant, pursued a one and a half year study of its dropouts. The aftermath of this study was a heightened interest by the Greater Columbia Chamber of Commerce to help at-risk youth.

The Greater Columbia Chamber, with the assistance of the Greater Columbia Community Relations Council, and the Richland County school district brought together a kaleidoscope of people to work together to meet the needs of at-risk youth: educators, business representatives, human service professionals, religious leaders, teachers, students, and parents. Collectively, they identified impediments to realizing desired goals, along with ways to overcome them.

Third Wave of Reform: Building on Success

Provided an efficient and effective structure for review: Extensive communications were established, specifically:

Regional forums were held in 1986 to report back to parents, the business community, and the public on how well the reforms were working and what additional steps had to be taken to keep reforms alive and fully operating.
A network of private sector leaders was formed. A directory of names, addresses, and telephone numbers of persons with expertise in the area of business/education partnerships was published yearly.
A leadership network of educators was created. Identified by their respective superintendents, these educators received training and assumed responsibility within their districts. These educators provided the state Department of Education with a yearly assessment of accomplishments and identified major areas requiring technical assistance.
Tracking the reform effort's progress was ensured by surveying business partners on how well the business partners were operating, what they were providing, what else they could provide, and how to improve their efforts. Parents also were surveyed to ascertain the extent to which the parents had been brought in at the school level.

"I went to the local Chamber of Commerce and asked them what businesses are doing and which ones have had successful interventions with schools. I then went to those businesses and learned from them—how they did it and what were the pros and cons."
Liberty Life Insurance
South Carolina

"Businesses can share some expertise with schools, but they should take care not to tell the schools what to do."
Liberty Life Insurance
South Carolina

A mechanism for businesses to deliver one-on-one technical assistance to districts within the businesses' regions was formed. The state was divided into six divisions, each with two regional coordinators who serve on a volunteer, yearly basis. The coordinators act as advisors to the state Department of Education and offer one-on-one technical assistance to districts within their region.

Regional workshops for business, education, and community representatives involved in the education reform effort were held every fall. The focus was on in-depth and practical training on how to accomplish a district agenda.

A yearly statewide conference brings together superintendents, partnership coordinators, and invited business leaders from the districts. The focus is on the link between economic development and education. Small group sessions are designed to elicit discussion about plans formulated during the summer months.

A strategy to market business partnerships was designed, in which major areas of business with employees across the state (i.e., electric utilities, chambers of commerce, press, realtors, broadcast media, etc.) have been identified and asked to map out an approach for promoting the partnerships.

Created and maintained appropriate staffing: Responsibility for creating and maintaining the reform agenda was specifically delineated and assigned. The joint business-education subcommittee created by the South Carolina Education Improvement Act has a full-time executive director. The Chamber has an education department headed by a vice president who oversees business/education efforts. The Columbia Youth Collaborative has a full-time project director. Within the Greenville County school district, a person is responsible for overseeing communication. The Alliance For Quality Education has an executive director.

"Our Chief Executive Officer was directly involved. Responding to requests from the public affairs division of the company, he spent a lot of time speaking out on behalf of the reform movement. He became a very visible advocate."
Springs Industries
South Carolina

Developed and maintained private sector input: Corporate participation extended beyond the chief executive officer and senior level management. Their involvement in planning and policy issues was complemented by employee participation in such areas as tutoring, management training for administrators and teachers, and serving on school improvement committees. A diverse private sector support base was cultivated. Businesses of various types and sizes worked toward building an improved educational system.

Monitored and evaluated reform efforts: On-going examination and reassessment were built into the Education Improvement Act. Periodic oversight revealed what was working but, even more important, what was not working and how to fix it. For example, the high failure rates on exit exams lead to a focus on remediation programs.

Issued periodic progress reports: Progress reports—"What the Penny Is Buying"—and newsletters from many sources (i.e., the joint business-education subcommittee, the accountability division of the state Department of Education) indicate what gains have been made. Regional forums were held in 1986 to report back to parents, the business community, and the public on how well the reforms were working and what additional steps had to be taken to keep the reforms alive.

- *Restructured schools to fully utilize the talents of teachers and principals:* Such actions included giving competitive grants to schools willing to institute programs using superior talents of teachers, technology, and/or community resources; exploring alternatives to reduce unnecessary paperwork; and developing means for schools to exchange information about successful interventions.

- *Rewarded performance:* An annual recognition award, The Education Improvement Act (EIA) Award, has been established.

The Fourth Wave of Reform: The School Reform Movement of 1989

- *The educational reform movement—new initiatives for 1989:* Buttressed by the support of Governor Carroll A. Campbell, Jr., new legislation, "Target 2000: School Reform for the Next Decade," was passed by the General Assembly. While built on the Education Improvement Act of 1984, the amended legislation was more narrowly focused and pragmatic. The new amendments incorporated the results of a two-year study of educational needs by a task force of leaders in business, government, and education. A summary of the mandated educational initiatives is included at the end of this section.

- *The 1989 agenda for the Alliance for Quality Education:* Recognizing the importance of sustained and increased grassroots support, The Alliance for Quality Education is developing a more encompassing membership through its $10 membership campaign. At the same time, new members have been appointed to its board in order to broaden representation throughout Greenville County.

Accomplishments to Date

- South Carolina is a leader in innovation. It is the only state with:
  An oversight committee of business leaders and other citizens to review the implementation and the impact of the state's reform legislation.
  A statewide incentive reward program for primary and secondary schools.
  An assessment center that screens all prospective principals.
  A principal incentive program.
  The largest per pupil funding to help students overcome reading, math, and writing deficiencies in grades 1-12.

- Between 1984 and 1989, scores on the SAT have increased 40 percent, the largest gain that any state has had.

- The number of students scoring above the national average in basic skills increased by 13.7 percent from 1983 through 1987.

- Enrollments of South Carolina students in advanced placement increased 250 percent, twice the national rate.

- Over 500 schools in South Carolina have been financially rewarded for high productivity and attendance over the past three years by the South Carolina Department of Education through the School Incentive Reward Program.

South Carolina has raised teachers' salaries to be competitive with other teachers in the southeastern region.

The percentage of high school graduates going to college increased 4.4 percent since 1983.

Business/school partnerships increased 600 percent since 1984. Six thousand businesses are officially involved with schools.

With the help of business, innovative programs are being implemented, i.e., a teacher recruitment center, homework centers for latchkey students, and a management center for school administrators.

A business/education state conference is held yearly to focus on the link between economic development and education and the benefits of collaboration.

In Retrospect: Why Success?

A governor's commitment and leadership talents: Governor Riley did more than give lip service to his intent to create a quality public school system. He succeeded in passing his proposed tax increase by gaining business support and bringing the right mix of people to the negotiating table.

The business community lobbied for the reform legislation: Business people sold the proposed reforms to the legislature and the people. Businesses publicly endorsed the Education Improvement Act, made speeches around the state, funded an advertising campaign encouraging voters to ask their legislators to support the reform bill, and met personally with legislators to lobby for the bill.

The need for change was advocated: To put issues in the forefront and to gain a diverse perspective, forums were held around the state.

The pursuit of a collaborative approach: A business/education/community alliance was built. This diverse support base was created by involving critical players in efforts to improve the quality of the educational system.

On-going communication of results: The public, as well as all relevant constituencies, were apprised of what had been accomplished on a frequent basis. The periodic report, "What The Penny Is Buying," noted current success stories and helped spur further commitment.

Appropriate funding of reform efforts: Legislation provided a consistent funding base over and above the General Assembly's annual funds for education. All revenues generated by the 1 percent sales tax increase were directed only toward improving the public school education system. Between 1984 and 1988, one billion dollars was invested in elementary and secondary education.

Top and bottom involvement: Opportunities were created for principals, teachers, students, and parents to work with leaders within the education system, the business sector, government, and the community.

South Carolina "Target 2000: School Reform for the Next Decade"

South Carolina's latest education reform package, "Target 2000," evolved from the work of a task force of business, education, and government leaders. Bob Thompson of Springs Industries headed the task force. The package, enacted June 1, 1989, has the following eight major objectives:

1. *Provide in the earliest stages of each child's educational experiences the best possible chance of success:*
   Expand the early childhood development program to serve all at-risk four year olds.
   Provide parenting classes, adult education, and seminars to families with children from birth to age five, to support the parents in their role as the principal teachers of their preschool children.

2. *Make significant additional basic skills goals in reading, writing, math, and science:*
   Expand coverage of the state compensatory and remedial programs to help all students who are testing below skill standards.
   Design curricula and instruction to assure that at-risk students are successful in achieving in an academically rigorous program.

3. *Cut the high school dropout rate in half by the year 2000:*
   Initiate a major dropout prevention program in every school district, which would include the early identification of potential dropouts, along with such prevention services as extra academics, mentor help, and parental involvement programs.
   Initiate a comprehensive effort to assist teenage dropouts in returning to school. Such effort would involve the community, other agencies, business, and the parents.
   Study the possibility of requiring attendance and progress in an education program in order for persons under 18 years of age to receive and hold a driver's license.

4. *Emphasize greater understanding by students of a variety of subjects beyond basic skills in order to achieve higher order thinking skills and creativity:*
   Stress reasoning and higher order thinking skills (including problem solving and arts education) for all students.
   Expand the gifted and talented programs.

5. *Provide flexibility to successful schools, encourage them to initiate new and innovative ideas, and reward them for success:*
   Provide resources with less bureaucratic red tape to schools, districts, teachers, and groups of teachers to explore more effective curricula, teaching methods, use of facilities, instructional technology, and use of time.
   Allow flexibility in regulations to productive schools.
   Provide training, support, and technical assistance to teachers/principals involved in improving schools.

6. *Continue to enhance the stature of the teaching profession:*

Maintain the original commitment to pay South Carolina's teachers at the southeastern average and maintain the statewide Teacher Incentive Program.

Expand the Teacher Cadet Program to include not only shortage fields and rural areas, but also minority teachers.

7. *Strengthen the accountability provisions at the school, district, and state level:*

Provide for an inflation factor in the budget for the School Incentive Program to maintain its significance relative to other programs.

Add additional criteria to the measure of school productivity, i.e., high school completion rate and higher order thinking skills necessary for students to be prepared for the 21st century.

Extend the life of the Division of Public Accountability to prepare the annual assessment report of state schools and conduct other monitoring functions with more public involvement.

Renew emphasis on school improvement councils in every school, to assist them to better carry out their role in local school improvement, planning, and monitoring school progress.

Strengthen the evaluation of the quality of education in local school districts and the annual state assessment report.

8. *Create the environment for and develop programs that expand business and parent involvement in the schools:*

Formalize at the state level a blue ribbon committee approach for business, citizens, educators, legislators, and state government leaders to be regularly involved in monitoring education and recommending education improvements statewide.

Expand business partnerships and the use of volunteers to include opportunities where school and business expertise is shared at the local school and district levels.

Strengthen the tie between the business community and the state Department of Education's business partnership program to provide more meaningful direction and involvement.

THE LOWNDES COUNTY, ALABAMA EDUCATIONAL IMPROVEMENT PROGRAM

Introduction

This profile focuses on a county-level partnership between the General Electric Corporation, Lowndes County, and the Lowndes County school system. The county, once ranked as the third poorest in the nation, has a population that is predominantly low income and black. Prior to GE's presence, the largest employer was a mill and clothing manufacturer that employed between 250 and 500 workers. The majority of businesses have nine or fewer employees. The county's school system has 3,000 students and a staff of 250.

General Electric's business decision to invest in a $400 million plant in Lowndes County, Alabama brought the corporation head to head with two of the most pressing problems confronting American businesses: first, the growing gap between skill levels and skill needs; and second, the need to ensure economic revitalization and contribute to healthy economic conditions.

Efforts in Lowndes County illuminate why businesses invest in restructuring an educational system, how to build an appropriate foundation to launch this effort, and how the program was implemented during the program's nascent stage.

How It Was Accomplished

The Launching Pad

A corporate presence in the community: In the mid-1980s, General Electric decided to build a multi-million dollar plastics plant in Lowndes County, Alabama. The "state of the future" equipment plant was the largest single investment ever approved by GE directors.

A desire to improve the public school system: The state of Alabama released an assessment of the Lowndes County public school system. The general consensus was that unless the education system improved, very few blacks would have the skills to work in the GE plant or other local businesses. County officials publicly concurred.

The corporate need for an improved education system: Recognizing the crucial role public education plays in ensuring a strong work force, the GE Foundation invited the school district to submit a proposal to improve pre-college education, particularly in math and science. In announcing the initiative, Paul Ostergard, then-president of the GE Foundation, stated: "The GE Foundation has successfully underwritten turnarounds in a number of urban, inner-city schools. One thing we've learned is that the road to excellence can be painful. It demands change from those who might be comfortable with mediocrity. . . students, parents, teachers. The challenge to this community is that at each juncture for change, the road selected must be the one that will provide the brightest future for Lowndes County youngsters."

"Once GE decided to build a plant in Lowndes County, the GE Foundation examined how it could target its resources to serve the community and build a future labor force."

General Electric
Lowndes County, Alabama

Investment beyond the grant dollar: From the very beginning, representatives of the GE Foundation and the GE plant directed their talents toward bringing about desired changes in the education system.

The school superintendent's support: Prior to the GE decision to fund an education improvement program, meetings were held with the superintendent to enlist his participation. The intent of these discussions was to emphasize that GE was a partner, not the director of the project. The result was a proposal presented by the superintendent to the GE Foundation. Approval of this proposal marked the beginning of GE's multi-year commitment to the Lowndes County educational system.

A public announcement of the project: In 1987, the GE Foundation announced its five-year commitment to improve the public schools of Lowndes County in the form of a grant of $1 million. This grant was the second largest grant in the history of the foundation and its largest ever given to public education. This commitment sent a clear message that education was important to the future of the county. It also encouraged involvement of other businesses and community leaders.

A broad support base: GE made it clear that Lowndes County had to "take ownership" of the the education improvement program. The company sought the support of the superintendent, the school board, teachers, school administrators, parents, students, representatives of local universities, representatives of local business, church leaders, elected officials, and other community leaders.

Goals: The goals of the education improvement project are 1) to triple the number of Lowndes County high school graduates who graduate from college and complete programs in mathematics, science, English, and related fields by 1992, and 2) to achieve systemic change in the schools through teacher and administrator training. These goals were communicated to all relevant parties.

Definition of the problem: At the local level, through a series of discussions, interviews, and documentary evidence of program success, specific problems were identified: a lack of consequences for good or poor performance by teachers, a lack of follow through on programmatic plans, inadequate classroom use of what was learned in training programs and educational improvement strategies, and inadequate parental involvement.

A slow and deliberate pace: Change was carefully monitored. The project intentionally began slowly during the first year; only a very small portion of the grant was spent. GE moved deliberately and cautiously. Its priorities were to plan carefully and ensure that relevant participants—parents, faculty, and administrators—were supportive of the program.

First Steps

Defined needs and priorities: A group of representatives from the education system, the community, and General Electric spent nine months developing a comprehensive educational improvement program.

Established direction for curriculum improvement and training: Four work groups were given the responsibility of moving the Lowndes County Education Improvement Program plan to a higher level of specificity.

Designed an action plan—the Education Improvement Program: The end result of the work groups was blueprints for teacher and administrator training, specialized curricula and programs for students, and well-defined support roles for parents, universities, churches, and the area's business community.

"Making it clear that it was the community's project, the GE Foundation sought the participation of relevant constituencies of the education system, elected government officials, local business representatives, and community leaders."

General Electric
Lowndes County, Alabama

From Planning to Action

Developed a phased program framework: Phase I of the action plan provides enrichment and motivation activities to students, teachers, administrators, parents, and the community. This phase of the program is initially targeted toward highly motivated and high achieving students. Phase II integrates activities into the Education Improvement Program that foster systemic change.

Targeted efforts: The Education Improvement Program involves 300 students, 29 teachers, nine administrators, and five potential administrators. While early efforts are directed toward promising college-bound students, the importance of reaching further down in the pool with each successive class has been stressed and will be pursued.

Developed a decision making process: Lines of responsibility and accountability were carefully defined to lessen the likelihood of slippage that can occur upon implementing the plan.

Established monitoring procedures: The superintendent of Lowndes County oversees the entire program. He is assisted by an advisory committee, chaired by the president of Tuskegee University, and including a parent, a teacher, a principal, at least one representative of a university of the Lowndes/Montgomery/Atlanta area, a representative of the GE Foundation, a representative of the local business community, a representative of the Alabama Department of Education, and a board member of the Lowndes County public school system. The superintendent, who serves as an active member on this committee, reports directly to the advisory committee.

Staffed the effort: The Education Improvement Program is directed by a full-time project director who reports to the superintendent, and works with appropriate subcommittees of the advisory committee and the external evaluator. The project director monitors activities directed toward improving student and teacher performance in grades one through six and general operation of the program.

The director is supported by a secretary and two coordinators, each located at one of Lowndes County high schools. Additionally, two senior level Lowndes County staff devote 20 percent of their time monitoring specific programs.

Identified available resources within the community: Possible sources of help were identified, i.e., the Alabama course of study, state funding and guidelines for developing adopt-a-school programs, the Montgomery County's Partnership in Education program, training programs undertaken for operators at the GE plant, summer enrichment and internship programs conducted by GE nationwide, the Alabama Office of Minority Business Affairs, Tuskegee University, and other community resources.

Created a support infrastructure: To reinforce the academic components of the Education Improvement Program, support activities were cultivated, specifically, activities leading to parent involvement and partnerships between public schools and universities, business, and government.

Developed evaluation procedures: To support decision making, a specific plan for periodic evaluation of the various dimensions of the Education Improvement Program was developed. This assessment will be conducted by an outside evaluator.

Accomplishments to Date

Implementation of the Lowndes County Education Improvement Program

The first year was devoted to building the appropriate operating framework for the program. Specifically:

Staffing the program.

Training principals and teachers in the target schools.

Initiating the first steps of the evaluation plan.

Establishing a support infrastructure.

Providing SAT/ACT test taking training.

Designing additional program elements and curricula for implementation in the 1988/89 year.

Introducing the family math program for parents and students.

Participating in the Saturday Tutorial and Enrichment Program.

The second year concentrates on incremental growth. Specifically:

Introducing new curricula based on the training received and developed by teachers and administrators.

Increasing the number of students participating in the Lowndes County Education Improvement program.

Providing work opportunities in industry to teachers and students so that they can better understand the industrial work environment.

Employing students during the summer so that they can develop work related skills.

- Recruiting GE employees to serve as one-on-one mentors for the students.
- Awarding the first four college scholarships to Lowndes County graduates.
- Building technology into the program for academic enhancement.
- Taking students to visit colleges.

Future years will build upon these experiences and the growing strengths of the Lowndes County School System.

THE GREATER MILWAUKEE EDUCATION TRUST

Introduction

The Milwaukee education restructuring efforts are noteworthy because of the extensive number of large and small businesses that are collaborating in the pursuit of a common set of objectives.

The building of the Greater Milwaukee Education Trust spans more than a decade. An overview of its development underscores that the road to restructuring a public school system is long and arduous. It is an incremental process driven by trust, a sense of urgency, a willingness to move from rhetoric toward informed action, perseverance, and, not incidentally, a sound organizational structure.

How It Was Accomplished

The Launching Pad

A history of business/education programs: In 1978, six business/high school partnerships were developed and sponsored by the Metropolitan Milwaukee Association of Commerce and the Milwaukee school system.

A public report of problems within the educational system and the need for change: In 1985, a comprehensive study of the metropolitan Milwaukee school system, initiated by Governor Tony Earl, revealed alarming inadequacies in the city school system. The governor, the state Department of Public Instruction, legislators, school board members, administrators, and inner-city minority leaders all agreed that the school system had to be improved. However, this did not answer the most critical question: What kind of change should occur and how should it be initiated?

The belief that economic development was dependent upon a quality education system: The Greater Milwaukee Committee (GMC) maintained that an economic renaissance could not be sustained without a well-educated labor force. After 50 years of focusing on "bricks and mortar" improvements, the GMC created an education committee. Businesses recognized that they had both a role and a responsibility in the education of youth. They could no longer be removed from social issues. Ultimately, both small and large companies would benefit by participating in building a quality education system.

A delimiting of business involvement: To diffuse anxiety that business would meddle in educators' turf, the business sector stressed its intent to play an advocacy role and limited its involvement to its respective areas of expertise, i.e., strategic planning, employee training and retooling, effective communication systems, personnel and human resource development, and other organizational/management issues.

"We were motivated by enlightened self-interest—we needed to be able to recruit employees from the cities in which we operate. . . we need employees who can read, write, articulate . . . who are motivated to achieve."
First Bank of Milwaukee
Milwaukee, Wisconsin

The First Milestone: 1986

- *Established the means for businesses to address deficiencies within the education system:* In 1986, in response to the governor's report and other national reports, the Greater Milwaukee Committee (GMC) focused on human resource development. To implement this thrust, three committees were formed: education, neighborhood development, and employment.

- *Set a primary mission for the GMC education committee:* The purpose of the GMC education committee was to encourage and support the implementation of policy changes necessary to improve the Milwaukee public school system.

- *Devoted time to learning:* The education committee met with key players: the governor and his education advisor, the state superintendent, Milwaukee legislators, Milwaukee school board members, the superintendent and several members of his staff, principals, administrators, teachers and teacher union representatives, and students. Members also brought in national experts and visited cities that had considerable experience in private sector involvement in urban schools.

- *Gained firsthand knowledge:* Members of the education committee visited schools and classrooms to learn about the realities of public education in Milwaukee, specifically the positive aspects (dedicated teachers and administrators performing well under pressing circumstances, neat and clean schools, order and discipline) and what educators perceived to be the most critical problems (the large number of exceptional education children in some schools, the dearth of management autonomy at the building level, the paperwork overload, the limited capacity of parents to be involved in a meaningful way, and the unfavorable image of the educational system in general).

- *Decided how to apply their business expertise:* Businesses considered the application of their own experiences in restructuring and took the following actions:
  - Offered assistance to the Board of School Directors in the area of strategic planning.
  - Endorsed the concept of site-based management and helped initiate site-based management by sharing business knowledge with educators.
  - Enhanced school/business partnerships by moving beyond guest speakers and occasional field trips or tours toward meeting the specific needs of the school as defined by that school, by involving more smaller businesses, by working with at-risk students in elementary and middle schools, by increasing teachers' understanding of the world of work through summer employment opportunities, and by becoming mentors.
  - Brought a wide array of organizations together to explore ways to reward student performance.

"Business and school officials must have heart-to-heart talks about what each needs, what are the key priorities, and what is practically possible."
First Bank of Milwaukee
Milwaukee, Wisconsin

The Second Milestone: 1987-1989

Created a top-down and bottom-up strategy for change: While top level decision makers within both business and the education system were involved in developing policies to achieve systemic change, teachers and students were in charge of implementing the programs emerging from these policies.

Initiated a grant program: A Teachers' Award Program (TAP) was implemented. Grants are made for new projects, innovative concepts, and ideas which directly benefit students and involve groups outside the schools (parents, businesses, civic groups, or community organizations). The program is funded by the private sector. Grants do not replace district funds or extend existing programs.

Established a policy of voluntary participation: School-based management and accountability at the building level had to be initiated by principals and their respective staff.

Acted on 1986 recommendations:

Strategic planning: Business leaders pressed top level management of the education system to include all relevant players in the planning, particularly principals and teachers; studied facility utilization and made recommendations to the Board of School Directors; and established the Marshall Plan Task Force, a broad-based committee of community leaders charged with the responsibility of rethinking how education is organized, how to improve teacher teaching and status, and how to create greater intervention and interaction between the community and the schools.

School-based management: Provided technical assistance to schools embarking on school-based management by finding management partners from the business community to help principals and teachers overcome barriers they identified.

School/business partnerships: Identified interested business leaders and delegated coordinating responsibility to the Metropolitan Milwaukee Association of Commerce.

Meeting the needs of at-risk youth: The One-on-One Program was created by business and civic leaders in order to better utilize existing youth serving resources. The 1988-89 goal was to have ten schools receive help from youth service agencies and business mentors. The program is funded by corporate contributions, foundation grants, and public sector sources.

Accomplishments to Date

A permanent structure to consolidate the partnership program: On February 13th, 1989, The Greater Milwaukee Education Trust, a nonprofit organization, was formed by the Greater Milwaukee Committee and the Metropolitan Milwaukee Association of Commerce. The Trust is responsible for the coordination of the Education Partnership Program, the One-on-One Program, the Teachers Award Program, and the School Based Management Partners Program. In addition, The Trust is charged with engendering new initiatives that complement its overall goals. Finally, it acts as a clearinghouse by providing information about what programming exists and what additional programming should be considered.

Funding: The Greater Milwaukee Education Trust has a $650,000 budget which includes an operating budget for the One-on-One Program.

Staffing: A full-time executive director was hired to coordinate partnerships at all school levels. The individual hired had the ability to work with the business sector as well as the education system. The executive director is assisted by two employees who have direct responsibility for the One-on-One Program and School Partnerships.

Expanded Greater Milwaukee Education Trust membership: The Trust's membership moved beyond business representatives to include a representative from education, government, a wide variety of community organizations, and funding sources.

General goals: Business was to act as a catalyst for change. All schools were to have a business partner. Community organizations were to be involved in the solution. Programmatic responses were to be developed within and beyond the educational system.

Specific program goals: Programs have mutually agreed upon goals and objectives that are measured annually. The goals are evaluated to ensure that resources are used efficiently and effectively.

An Education Partnership Resource Guide: A guide was designed to assist and help direct business/education partnership efforts, and not dictate format. The guide outlines the process for establishing partnerships between schools and business/community organizations. It does not define what activities should be pursued or what constitutes an effective partnership. Instead, the guide provides the relevant ingredients so that partnerships can be based upon needs and choice.

A marketing/fund raising campaign: Brochures describing The Greater Milwaukee Education Trust and its respective programs, participants, and funders and how to get involved as a volunteer and a financial contributor are used to inform and increase participation in business/education partnerships.

"To maintain commitment, both companies and schools must note who is responsible and then free up enough time to do what is necessary."

Aurora Health Care
Milwaukee, Wisconsin

THE ROCHESTER INITIATIVE

Introduction

The city-wide education movement in Rochester, New York illustrates that restructuring does not happen in a vacuum. Instead, it emerges from a climate for change that has been established incrementally a number of years. Grassroots efforts set the stage for Rochester's nationally acclaimed programs.

Furthermore, the Rochester story demonstrates the importance of pursuing a collaborative approach. Building a quality school system has involved Eastman Kodak, Xerox Corporation, Bausch and Lomb, General Motors, Wegmans Food Market, Inc., other area businesses, relevant constituencies within the education system, and community leaders and organizations. The value of this strategy has been stressed by Kodak's CEO, Kay Whitmore: ". . .what made Rochester's effort unique was its broad scope and its many participants. A real commitment has been made by nearly everyone in the community."

How It Was Accomplished

The Launching Pad: 1978-1983

A history of business involvement: In 1978, loaned executives from Xerox Corporation, Eastman Kodak Company, and General Motors Corporation helped plan Pris²m: Program for Rochester to Interest Students in Science and Math. The program, established by the Industrial Management Corporation (IMC), was designed to encourage minority high school students to stay in school, to focus on achievement, and to consider future careers in science, math, and engineering. Twenty manufacturers pledged to fund the program for ten years.

The financial problems of the school system: The fiscal crisis of the early 1980s created a major shortfall in the school's budget. The city was without a sound property tax base, a primary source of income for the city school district, and had already taxed its residents to the limit. As a result, the school district cut programs and incurred massive deficits.

A collective response of business and education: In 1982, a blue ribbon task force composed of representatives from business and education examined how business and the community could help city schools. A year later, the task force grew into a steering committee of fourteen.

The Rochester Urban League's report: In 1984, the Urban League underscored the low performance of urban schools by citing statistics: 30 percent of the schools' students dropped out; 20 percent had received suspensions for poor behavior. Only 3 percent graduated with a "B" or better grade average.

Impetus for change within the school system: Both the superintendent and the president of the Rochester Teachers' Association wanted change: the superintendent was pushing for teacher empowerment while the union president argued for teacher accountability.

An acknowledgement by the superintendent and the union president that business and community leadership was essential: Both realized that without the long-term commitment of financial and political support by business and community leaders, the reform agenda could not go very far.

Formalizing the Effort: 1984-1986

Established a Center For Educational Development (CED): In 1984, efforts to improve the school were initiated. The Center was initially funded by the Public Education Fund, a nonprofit organization headquartered in Pittsburgh. This support was augmented by local businesses, community organizations, and individuals.

CED became active in a variety of areas: encouraging adopt-a-school programs, distributing donations from business and the community through a clearinghouse, giving mini-grants to teachers for special projects, bringing volunteers into the schools, and building community support and involvement.

Implemented the Urban League's five-phased program in 1985: To "attack and resolve" problems in the school, the League outlined and orchestrated the following phases:

Phase I: A series of meetings with key community groups that included educators, businesses, and clergy. The meetings focused on identifying issues, not fixing blame.

Phase II: A series of "speakouts" for students, parents, and educators. The intent was to address a critical question, "What can be done to improve the academic performance of students?"

Phase III: A conference at the University of Rochester. Over 150 community leaders met to discuss the Rochester school crisis.

Phase IV: Town Meetings. Meetings were held in twelve neighborhoods in order to generate a diverse support base of organizations and individuals.

Phase V: School action committees and a community oversight group, the Rochester Business and Education Roundtable, were initiated.

Formed two task forces: As the Urban League was implementing Phase V, two task forces were developed: A Business/Education Task Force, commissioned by the Rochester area Chamber of Commerce, Inc. and the Industrial Management Council of Rochester, N.Y, Inc., and the Community Task Force on Public Education, convened by CED and the Urban League of Rochester.

The Business/Education Task Force was staffed by full-time executives on loan from Kodak, Xerox, Bausch and Lomb, and Wegman's for six months. Their primary task was to define the role of business by studying issues surrounding the improvement of the public school system.

The Community Task Force membership included representatives from the education system and nearly every segment of the community. They were given the responsibility of defining strategies to ensure a quality city school system.

"The Chief Executive Officer of Kodak has been an avid advocate of strategies to enhance the quality of Rochester's education system."

Eastman Kodak
Rochester, New York

Delineated five effective responses for business: The Business/Education Task Force offered five ways business could intervene. Based upon their careful study of efforts in other cities and nationwide studies, they presented an agenda for business action:

One: Provide employment opportunities as incentives and for exposure to the work world.

Two: Help build partnerships at the school level.

Three: Provide marketing assistance to increase community awareness, garner support, and increase parent and community participation.

Four: Provide staff development for teachers, counselors, principals, and administrators.

Five: Provide the city school district with access to problem solving capabilities in support of non-instructional systems and services management.

These tasks were incorporated in the Community Task Force report "A Call for Action."

"Our CEO has been a highly visible advocate for building a quality school system."
Xerox Corporation
Rochester, New York

Issued a call to action: In 1986, the Community Task Force incorporated their recommendations with the work of the Business/Education Task Force and issued an action agenda. The document offered a series of recommendations. Several main themes emerged: increased involvement of parents, increased participation of students in their education, increased community support, professionalization of teachers, academic rigor, and pre-kindergarten education.

Sustaining the Momentum: 1987-1989

Instituted change at the teacher level: New labor contracts helped define and sustain new education structures. Specifically, teachers were to be held accountable for student achievement. They could be assigned where needed and they could be dismissed if their performance was not improved by peer mentoring. They also were required to work longer work hours and more days.

Increased teachers' salaries: The school district agreed to raise teachers' salaries by 40 percent over a three-year period, with a $4,500 increase during the first year. As a result, highly qualified, veteran teachers could earn as much as $70,000.

Established a Home-Base Guidance Program: Teachers mentor 20 students each year. Their responsibilities include monitoring attendance and performance, counseling in the areas of present and future academic work, helping with part-time and summer employment, and involving parents in school activities.

Implemented the Rochester Brainpower Program: The Brainpower Program is a city-wide effort designed to improve the quality of the public school system of Rochester. The Brainpower Program established a structure for the business community's assistance to the schools. Brainpower combines the expertise of businesses and community organizations in the areas of jobs, partnerships, marketing of education, management consulting, and staff development.

Funded the Brainpower Program: The 1987-88 budget of $500,000 was provided by area businesses and industries. The primary funders are Kodak and Xerox. In-kind contributions, of equal value, augmented this funding base.

Utilized community resources to implement the Brainpower Program: Rochester Jobs Incorporated coordinates the jobs component of the Brainpower Program. The Governor's School and Business Alliance and the Center for Educational Development coordinates the partnership activity. The Advertising Council of Rochester and Hutchins/Y&R and Saphar and Associates oversee the communication system of the program.

Moved the National Center on Education and the Economy to Rochester: The Center, the successor to the Carnegie Forum on Education and the Economy, received a $5 million grant from New York state. A loaned executive and two retired executives from Xerox worked with the center. One of its primary functions is to help implement Rochester's blueprint for change, based largely on the Carnegie Forum on Education and the Economy report ***A Nation Prepared: Teachers for the 21st Century***. Its work is closely associated with the Rochester school district and is defined in a contract with the school board.

Developed a new Brainpower Initiative—The Rochester Brainpower Hall of Fame: Recognition is given to individuals with successful careers who have overcome significant barriers in order to graduate. The purpose of this annual program is to provide meaningful, visible role models for urban students. Recipients also will visit city schools and speak directly with students.

Marketed the value of education: The Advertising Council of Rochester, under the aegis of the Brainpower Program, markets the need for an improved public school system, the importance of inclusive participation, business contributions to date, and the way to get involved.

Accomplishments to Date

A strategy to restructure the education system: Rochester has taken actions to bring about:

Change affecting teachers, including the design and setting up of an accountability system for teachers and a new teachers' pay arrangement.

Change affecting students, including an expansion of early childhood programs; the division of 7th-12th grade schools into middle and senior high schools; the removal of geographical boundaries; the selection of schools by students on a first-come, first-served basis; and the assignment of "home base" teachers to middle and senior high school students.

Change affecting the operation of the education system, including the instigation of school-based planning; the development of new standards, measures, and an accountability system; an improved teacher recruitment, selection, placement, and retention process; and an improved staff development program.

The Rochester Brainpower Program: Progress has been made in the five areas identified as the most effective responses business and community organizations can make to help improve its public schools:

Jobs: Over 1,200 students have been placed in job training workshops since 1987 and more than 1,700 students have received part-time, weekend, or summer jobs as an incentive for keeping their grades at a passing level.

Partnerships: Business and community organizations participate in 77 partnerships, providing broad scale interaction between employers/employees and students, faculty, and administrators at the school building level.
Marketing of education: Through a full-scale marketing and public relations campaign designed to engender on-going support, an audience of 6.2 million was reached during the first two years. Championed by the Volunteer Council of Rochester, donated services have been valued at $1.1 million.
Consulting resources: A panel of business and higher education experts has assisted the city school district in reviewing personnel policies. Programs provide the district with access to management consultation and budget strategies. Planning teams are in place in all of the city's 50 schools. Principals are beginning to share authority.
Staff development: The Rochester Teachers' Center has provided opportunities to enhance professional and management skills to more than 5,000 teachers. To date, over 60 programs have been held in 17 sites.

A collective response to improve education in city schools: In addition to the Rochester Brainpower Program, these organizations are involved in building a better education system:

Urban League of Rochester, N.Y., Inc.: Since 1986, the league has increased the flow of funding from business and government agencies into tutoring, mentoring, and parent involvement activities.
Center for Educational Development: Since 1984, more than $350,000 in grants and nearly $500,000 in materials have been provided to city schools.
National Center on Education and the Economy: The Center spearheads research on the feasibility of high performance schools to meet the educational needs of the nation's workforce.
Rochester New Futures Initiative, Inc.: Aided by a $750,000 grant over two years from the Annie E. Casey Foundation, the organization coordinates social services in selected schools, and will implement training, mentoring, youth leadership, and parent empowerment programs.
Pris'm: Since its inception ten years ago, the program has been coordinating efforts of hundreds of science-related professionals from local companies who work directly with high school students and serve as role models.
Rochester Jobs, Inc.: RJI manages the Rochester Brainpower jobs program that provides pre-employment training and after school and summer employment as motivational tools for at-risk students.

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